

Session 6: Module 6 - End Certification Process	
SCRIPT	
Description	Text
1. Introduction	Welcome to Session 6 Module 6
2. Start	End Certification Process, Part One
3. <ReviewCert>	We've reviewed all of the sections in the CGS, except for Issue Benefits, and now it's time to discuss the end certification process.
	We've used the Event Log - Review Certification for Errors function a couple of times already.
	Let's click the icon again now that we've completed Bailey's CGS.
4. <ReviewCert2>	If there aren't any required components missing the following message displays...
	...indicating the "certification information is correct".
	Click OK.
5. <ReviewCert3>	There are two ways to initiate the end certification process.
	You can select the End Certification icon, which allows you to end the certification without issuing benefits.
	Or, you can click the Issue Benefits link, which functions the same except it opens the Issue Benefits screen first.
	Let's click the End Certification icon.
6. <ReviewCert4>	...the same Event Log - Review Certification for Errors would open and indicate what was missing.
	Click Close.
7. <end1>	However, we DID complete everything. So, click the End Certification icon again...
8. <end2>	...and this same message we just saw displays.
9. Important	It is important to note that you must either click the End Certification icon or click the Issue Benefits link to complete the certification.
	Clicking the Review Certification for Errors icon (or the Close Certification icon for that matter) will not complete the certification process.
10. <end3>	Click OK.
11. <end4>	The Applicant is Certified window displays the information calculated during the end cert process.
	The system performs one last analysis to ensure all applicable system-assigned risk factors have, in fact, been assigned.

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	It then assigns the highest applicable priority based on WIC Category and the risk factors assigned during the certification.
12. Note	It should be noted that Women under 18 years old are assigned a different priorities by M-SPIRIT than women over 18 years old based on risk factors and WIC Category.
13. <end4A>	The Cert End Date is also calculated...
14. EndCert	...as shown.
15. <end4B>	If the participant is in a current cert when the new cert is started...
16. <end4C>	...the system updates that Cert End Date to the current date to effectively end that cert period and eliminate any potential overlap in certification dates.
17. <end5>	Back in Bailey's CGS...
	Notice that the Schedule Appointment checkbox is default selected.
	Keeping the chekmark will result in the Schedule Appointment screen opening next.
	If we were going to schedule a follow-up contact or high risk visit, we would keep the checkbox selected.
	However, let's remove it for now. Go ahead and click on the checkbox.
18. <end6>	The Generate Certification Notice checkbox is also default selected.
	This automatically sends the Certification Notice to the printer when you click OK on this message.
	In general, we don't print this notice.
	Go ahead and click the checkbox to remove the checkmark.
19. <end7>	Now that we've removed the default checkmarks, click the OK button.
20. <end8>	The system automatically begins the electronic signature process.
	The first step is to capture the parent or proxy's signature indicating they have read and understand the Rights and Responsibilities statement.
	The parent or proxy only has to sign one time regardless of the number of members certified on a specific date.

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	The Cancel button on this window completely cancels the participant signature capture process, essentially skipping it.
	If you click the Cancel button, you will not be able to re-open this window and you will have to have the participant sign a paper copy of the Rights and Responsibilities.
21. Manual	The paper copy of the Rights and Responsibilities is available on the Montana WIC web site.
	If you are unable to capture a participant's signature electronically for any reason, you must have them sign this form.
	You need to scan the form into the participant folder for each member of the household listed.
22. <end9>	That is a lot of extra work. Avoid it by NOT CLICKING THE CANCEL button.
	The Capture Electronic Signature button initializes the signature pad. Go ahead and click it.
23. <end9A>	The Signature Capture window is a representation of the screen on the signature pad.
24. <end10>	Once Bailey has read the Rights and Responsibilities...
	...she should press the Next button with the attached stylus.
25. <end11>	Our window clears...
26. <end12>	...and the signature pad screen displays a signature line and OK and Cancel buttons.
	If Bailey were to press the Cancel button, the system notifies you...
27. <end13>	...with a message.
	Click OK.
28. <end14>	The signature process starts again. Click the Capture Electronic Signature button.
29. <end15>	As Bailey signs the signature pad, her signature displays on our screen.
<end16> - <end21>	<no script>
36. <end22>	When Bailey presses the OK button...
37. <end23>	...her signature displays in the Authorized Signature section of the screen and is ready to be saved to the database.

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	Notice the Capture Electronic Signature button is still enabled. However, if you click it now, the current signature is discarded and you start ALL OVER AGAIN.
	Once you click the Save Signature button, the system saves Bailey's signature to the database.
	Currently, though, her signature for the Rights & Responsibilities does not display anywhere in M-SPIRIT.
	Click the Save Signature button.
38. <end24>	Since there aren't any other members of Bailey's household that are eligible for certification, this message displays.
	Click OK...
39. <end25>	...and the CGS closes.
40. <end26>	Let's take a look at the end cert process when certifying multiple household members at one time.
	We've completed the CGS for the Jack family, which includes Pepper, Colby and Monterrey.
	We want to issue benefits, but to the household, not individually.
	Remember when we said that issuing benefits performs the same end certification process as clicking the End Certification icon?
	The only difference is that the Issue Benefits link opens the Issue Benefits screen first, before the Capture Electronic Signature windows.
	So, the best way to do this with multiple members is to end the certification using the icon until you want to end the last member's, then use the Issue Benefits link.
	So, let's do that. We want to end Pepper's certification first. Go ahead.
41. <end27>	<no script>
42. <end28>	Remove the checkmarks...
43. <end29>	<no script>
44. <end30>	Click OK.
45. <end31>	Click the Capture Electronic Signature button.
46. <end32>	The participant presses Next on the signature pad...
47. <end33>	...and signs and presses OK.

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48. <end34>	Pepper will only have to sign once for the Rights & Responsibilities, which covers all members certified on the same day.
	Click the Save Signature button.
49. <end35>	OK. One done...two to go.
	The Work with Another Household Member Certification window automatically opens.
	The members in this grid are either eligible to have a certification started or have an open CGS.
	Remember, we have been simultaneously certifying all three members. Monterrey is already selected so go ahead and click OK.
50. <end36>	Since Monterrey's folder and CGS are already open, this message appears.
	Simply click OK.
51. <end37>	...and the system automatically brings Monterrey's folder to the top of your desktop.
	And we start the end cert process again. Go ahead.
52. <end38>	<no script>
53. <end39>	Remove the checkmarks...
54. <end40>	<no script>
55. <end41>	Click OK.
56. <end42>	<no script>
57. <end43>	<no script>
58. <end43>	Easy peasy, right? Well done.
	We are going to end this module here and finish this process in the next module.
59. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions Forum on the Montana WIC website.